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august 1990

automotive FLEET

CAR AND LIGHT TRUCK FLEET AND LEASING MANAGEMENT MAGAZINE

'91 Sneak Preview
Lessors Going Global
'91 Lessor Selectors
Truck Spec'ing Made Easy

Hal Barton, general manager, Chrysler Fleet Operations with the 1991 Dodge Shadow Convertible and Plymouth Voyager

automotive
FLEET®

CAR AND LIGHT TRUCK FLEET AND LEASING MANAGEMENT MAGAZINE

BOBIT PUBLISHING

August 1990
VOL. 29, NO. 10

Influencing the management of 4,952,000 cars and 2,070,000 light trucks and vans in business, leasing, rental, utility, government, police, and taxi fleets.

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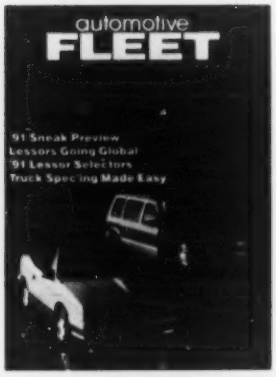

On the cover: Hal Barton, general manager, fleet operations for Chrysler, stands before the 1991 Plymouth Voyager and Dodge Shadow convertible. Our 1991 sneak preview begins on p. 32.

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U.S.-Based Vehicle Lessors Plan for Global Expansion

Because of economic and political changes in Europe, U.S. companies with foreign subsidiaries are pulling American lessors overseas. This turn of events will soon require U.S. fleet managers to think globally and act locally.

What happens in 1992? That's the 500th anniversary of Christopher Columbus' discovery of the New World, and the year Spain will host the Summer Olympics.

It is also the year that all the barriers in the European Economic Community (EEC) will come down, making trade, for instance, between England and the new Germany as easy as the commerce that passes from New Jersey to Pennsylvania.

This historic event will create a single, integrated market of about 320 million new customers. Price levels are expected to drop by six percent. EEC-member trade is expected to rise 10 percent. Five million new jobs will be created.

And more vehicles will be needed.

This fact has not escaped the strategic market planning of U.S.-based vehicle lessors. For many of them, 1992 is the target date to have expanded international operations in place — the time to be "global" in their thinking and capability. For others — unfamiliar with the nuances of foreign trade — 1992 will mark their first cautious steps into the global vehicle leasing marketplace.

MARKET PENETRATION

What Percentage Of Your Foreign Leases Involve Companies Which Are...

	U.S.-Based Vehicle Lessors						
	1	2	3	4	5	6	7
American	15%	100%	0	100%	24%	15%	5%
European	80%	0	0	0	66%	0	95%
Asian	0	0	0	0	7%	0	0
Other	5%	0	100%	0	0	85%	0

*NOTE: Three of the U.S.-based lessors surveyed are not engaged in overseas vehicle/management operations.

Global Leasing Survey

Consequently, *Automotive Fleet* thought it appropriate to poll the nation's top lessors, asking about their capabilities, global business plans, and, for their observations on the trickle-down effect that global vehicle leasing will surely have on the fleet managers of American-based companies.

The questions were answered by the top executives at each company — senior vice presidents, presidents, and, (in one case) the chairman of the board of directors. Because of the sensitive nature of the information, specific business strategies cannot be revealed, but the general response of these executives demonstrates that vehicle leasing has embarked on a historic course which will have lasting — and logically — positive effects on the structure and status of American vehicle leasing companies.

Observed Automotive Rentals, Inc., Senior Vice President Kenneth Baittinger:

"Obviously, all the manufacturers are working toward global production and marketing of vehicles. I wouldn't be surprised — but I can't

give you a time frame, because that's a crystal ball kind of thing to see the manufacturers, maybe even fleets and leasing companies, negotiating quotas on a worldwide basis for the production of vehicles, particularly in Europe.

"We've had some conversations to that effect already."

Survey Response Overview

The survey revealed unquestionably that seven out of the nation's Top 10 lessors are now engaged in global vehicle leasing and fleet management. And more importantly, the majority of those lessors have already penetrated foreign fleet markets.

The latter is a significant point, for while some companies claim to have an international presence, it is important to note whether their foreign operations consist of vehicle leasing with American companies — or with foreign companies on foreign soil. The survey showed only two American lessors rely 100 percent on American lessee business in foreign-based operations, while the remaining five that are active in the global market only rely on foreign-based American companies for five to 24 percent of their business.

Interestingly, this global penetration of the vehicle lease market has succeeded despite obstacles. Asked what the greatest barrier is to international market entry for U.S.-based lessors of vehicles and fleet management services, the respondents (restricted to one choice) ranked cultural differences first (four selections), followed by problems with business connections, bureaucratic red tape, and recruiting local employees (each with two selections).

While their success in penetrating the global market indicates a high level of knowledge and international business acumen, some of the American vehicle lessors have accomplished much with great persistence and, initially, very little savvy about the global vehicle leasing marketplace.

The lessors were asked to rank their company's current *general* level of expertise/knowledge of foreign markets on a scale of one to five (five being best). Three of the 10 rated themselves a "five," while another which had recorded significant strides in the global market gave itself a "four" (reasoning that no company deserves a perfect "five"). Others rated themselves a "three" (one), "two" (two), and the three not yet in the global market rated themselves at "one."

Kenneth Baittinger, senior vice president, ARI

"I wouldn't be surprised . . . (seeing) even fleets and leasing companies negotiating quotas on a worldwide basis. . ."

Growth Expansion

Are U.S.-based vehicle lessors simply taking advantage of investment opportunities to make some quick, easy profits? The answer is "No."

While there is certainly the opportunity for investment growth in the global vehicle leasing market, American lessors admit privately that foreign operations yield no fast financial bonanzas. In fact, the top executives at the surveyed companies said the reverse is true: one cited the example of a foreign subsidiary which lost money for eight years before its books went out of the red and into the black; and another said it had its "brains kicked in" financially on two separate foreign ventures.

Why, then, do American lessors persist in trying to penetrate the global markets? American lessors view the U.S. market as not only "mature," but also one that is highly competitive with narrow profit margins. They hold a contrary view of global markets, particularly Europe — which they term "immature" and offering much potential.

This global market potential for them breaks down into two areas. The first involves vehicle leasing and financing. Vehicle lease funding is already well-established in Europe, but while Ford, Renault, and Deutsche Bank routinely fund vehicle leases, they experience some difficulty in controlling these assets (vehicles). As a result, U.S.-based lessors perceive fleet management services as the major opportunity for global vehicle leasing — a chance to apply their proven management techniques, particularly, maintenance, administration, and cost controls.

Potential in Fleet Management

For that reason, half of the U.S.-based vehicle lessors surveyed maintain sales/service offices outside of America. In addition, three of those five have signed clients to fleet management service contracts under: their lease, another lease, ownership, and other methods.

More significantly, the three U.S.-based lessors which are *not* currently in the global marketplace said if asked to recommend a focus on a foreign leasing business venture with the *most promising future*, they would recommend their companies target supplying fleet management services. Not only that, but two other companies already involved in global vehicle leasing/financing indicated that they would make similar recommendations on their companies' future focus.

The Extent of U.S. Interests

The seven American vehicle lessor companies currently doing foreign business gave a survey breakdown by country as follows: Canada (seven),

England (four), France (three), and one each in categories of Australia, Japan, Netherlands, and "other" locations.

The extent of their involvement in foreign markets is significant. Of the seven players in the global market, three have major stakes with their reported numbers of leased vehicles pegged at 42,000, 60,000, and 80,000. Of those which manage foreign-based fleets, one lessor said it managed "more than 500 foreign fleets." Another set the figure at "more than 1,000."

The U.S.-based lessors also indicated what countries are the *most attractive* as future markets, with the top four choices listed as Canada and East/West Germany (both at seven), England (six), and France (five). Japan and the Netherlands each rated four choices, followed by Australia and Spain (two apiece), and one choice each for Italy, Korea, and the general Pacific Rim area.

Notably, the attention of U.S.-based vehicle lessors seems to be only directed at the European continent, not at Asia and Australia, both of which are frequently talked about as areas of opportunity. The reason is economic growth in those areas is comparatively slow.

Economic growth forecasts for 1991 for Japan are set at 4.3 percent; Australia's is two percent. Just the same, in less than two years one U.S.-based lessor operating in Australia has joint venture funding of about 1,200 fleet vehicles, and is expecting to open two additional sales/service offices for a total of four in 1991.

Cultural differences with Pacific Rim countries, however, deter most U.S.-based lessors from the region. But one of the oldest players (26 years) in the Pacific Rim is redirecting its efforts at Europe. Said a company spokesman:

"Today, the focus is in Europe."

Impact to U.S. Fleet Managers

As these U.S.-based companies expand into foreign markets—particularly, Western and Eastern Europe—they are going to need more vehicles to move goods and supply services. At the same time, it is expected there will be increased interest from foreign-based fleets which will seek advice from U.S. lessors on ways to gain greater efficiency in fleet management.

There are four major areas of change from which the lessors expect to see trickle-down effects for American fleet managers:

1). Demand on the subsidiaries and manufacturing arms of U.S. automakers for fleet cars will increase sharply. The EEC and expected unification of East and West Germany are two factors. Moreover, though, Europe is progressive-minded these days, and the only thing which has prevented the complete economic unification of the European continent is resistance from Great Britain Prime Minister Margaret Thatcher to a common currency.

Don Kreft, president, Lease Plan USA

"We're going to start seeing the same vehicles all over the world, and the only difference will be if they're right-hand of left-hand drive."

2). U.S.A. competition in the global marketplace will stiffen with the increasing involvement of automakers in the vehicle funding and distribution network. (Ford owns Ford of Europe, Ford-Werke AG, and now Jaguar, as well as such lessors as Associates and USFL in addition to funding the recent buy-out of Budget. GM owns Opel, Vauxhall, 50 percent of Saab Automobile AB and a percentage of National Car Rental and Avis. Chrysler is funding General Rent-A-Car, and it owns Thrifty, Snappy, Dollar, and part of Mitsubishi Motors.)

3). The manufacturing strategy of U.S. automakers will change with ever-increasing volume demands from foreign fleets. As a result, sales strategies—here and abroad — will change also.

4). "Global cars"—such as Ford's Escort will gain worldwide acceptance. It is not far-fetched, most lessors said, to expect to see such easily-identified, standard fleet cars everywhere.

These changes raise a number of questions for American fleet managers. What will be the possible impact on resale for such ubiquitous global vehicles? Will American automakers adopt the European-style of negotiation for volume purchases? Will U.S.-based lessors and fleet managers piggyback on worldwide, volume deals?

The answers depend — not on whether the U.S. and international marketplace will ultimately coalesce into one, worldwide entity — but how soon the change will occur.

To Don Kreft, president of Lease Plan USA, the full impact of U.S.-based entry into the global market won't be felt until the late 1990s. (Although owned by the Dutch bank ABN, Lease Plan USA is one of the largest U.S. vehicle lessor that is also an international vehicle lessor, said Kreft. Lease Plan's worldwide operations have 115,000 vehicles currently under lease. Consolidation, Kreft said, is the "wave of the future.")

"Why should (international) companies split up into more functions if we get into these global vehicles — if that's what you want to call them? Who knows where cars are made anymore?" asked Kreft rhetorically. "We're going to start seeing the same vehicles all over the world, and the only difference will be if they're right-hand or left-hand drive." AF

Midyear Fleet Registrations

1989- vs.1990-Model Year: The First Six Months

MODEL	1989 Model Year Total	1989 1st 6 Mos MYTD	1990 1st 6 Mos MYTD
SUBCOMPACT			
323	1,767	2,330	1,750
Cavalier	63,357	41,238	32,368
Summit/Colt	1,492	469	99
Escort/Festiva	54,871	36,094	30,386
Fox	2,473	886	189
Firenza	77	67	—
Golf/GTI	1,981	518	244
Horizon	3,028	1,722	3,167
I-Mark	1,113	832	—
Jetta	4,120	1,382	1,290
LeMans	10,249	1,628	2,534
Nova/Geo Prizm	16,111	3,201	26,059
Omni	3,794	2,033	3,582
Precis	1,698	1,688	3,781
Sentra	33,356	22,828	16,044
Skyhawk	2,823	1,642	3
Sprint/Geo Metro	5,467	3,367	13,548
Sunbird	20,881	12,670	24,442
Tercel	11,720	6,992	6,575
Tracer	7,238	3,408	774
Total Subcompact	**247,616**	**144,995**	**166,835**
COMPACT			
200 SX	10,928	5,138	—
Acclaim	24,286	10,022	21,719
Aries	28,326	21,232	187
Cutlass Calais	12,734	7,703	13,339
Conquest	23	8	2
Corolla	38,447	20,818	27,574
Corsica	80,902	30,959	26,725
Eclipse/Cordia	253	295	554
Grand Am	62,620	40,010	31,693
Lancer	494	453	10
Medallion	28	27	—
Mirage 4 DR	8,705	4,580	7,178
Protege	—	—	2,457
Reliant	22,908	17,002	136
Shadow	21,118	14,578	21,524
Skylark	17,246	3,457	16,611
Spirit	23,359	9,763	21,260
Stanza	5,879	1,846	5,275
Subaru (all models)	30,596	21,374	7,751
Sundance	21,308	14,776	16,017
Tempo	79,093	49,741	48,469
Topaz	26,487	14,967	11,813
Vista	164	125	15
Total Compact	**515,904**	**288,874**	**280,309**
INTERMEDIATE			
600	68	55	—
626	3,881	2,400	2,742
6000	27,342	15,396	12,586
Camry	45,238	23,188	25,133
Caravelle	52	35	—
Celebrity	65,523	39,440	4,686
Century	36,219	21,531	18,004
Cutlass Ciera	53,296	30,874	19,850
Dynasty	63,284	37,838	31,573
Galant	4,110	1,501	4,029
LeBaron	583	515	83
LeBaron Convertible	14,258	9,540	7,137
LeBaron Coupe	7,556	5,542	1,549
Lumina	21,891	1,140	45,433
Monaco	—	—	14
Maxima	15,387	6,869	9,701
Monte Carlo	86	76	—
MX-6	2,945	672	999
New Yorker (all models)	24,336	18,984	3,554
Passat	31	—	172
Premier	6,705	1,226	453
Sable	40,040	16,571	18,157
Sigma	219	132	151
Taurus	142,735	73,139	70,794
Volvo 244	2,295	19	1,246
Volvo 245	1,121	20	182
Volvo 744	915	25	299
Total Intermediate	**580,116**	**306,728**	**278,527**
STANDARD			
Bonneville	19,938	10,810	8,491
Caprice	50,509	20,441	23,107
Crown Victoria	35,775	15,158	16,982
Delta 88	19,658	11,164	5,880
Diplomat	4,177	3,870	—
Fifth Avenue M	311	287	23
Fifth Avenue Y	1,462	---	4,571
Gran Fury	3,217	3,221	—
Grand Marquis	12,445	6,275	7,470
LeSabre	21,269	13,109	5,965
Total Standard	**168,761**	**84,335**	**72,489**
LUXURY			
929	2,757	426	980
98 Regency	8,484	4,795	3,082
Allante	696	329	61
Chrysler TC by Maserati	—	—	12
Cimarron	53	48	—
Cressida	4,343	2,612	764
Continental	16,818	8,736	13,412
Corvette	2,778	1,344	300
DeVille/Fleetwood	35,344	19,556	26,788
Eldorado	4,088	2,115	1,108
Electra	11,917	5,293	6,136
Fleetwood Brougham	8,669	5,101	2,946
Imperial	—	—	1,279
Mark VII	4,441	2,093	2,242
Riviera	2,019	964	234
Scorpio/XR4Ti	1,085	681	129
Seville	9,730	5,035	7,074
Town Car	48,836	23,519	25,362
Toronado	868	536	824
Total Luxury	**162,926**	**83,173**	**92,733**
SPORTS/SPECIALTY			
240 SX	8,029	3,603	3,319
300 ZX	3,571	1,206	2,604
Beretta	24,616	12,600	7,538
Cabriolet	1,580	750	371
Camaro	5,018	2,525	531
Celica	6,621	3,558	3,646
Corrado	18	—	161
Cougar	18,691	10,106	7,047
Cutlass Supreme	30,156	16,592	12,736
Daytona	2,265	1,384	939
Fiero	161	150	—
Firebird	2,505	1,291	224
Grand Prix	29,958	19,292	11,907
Laser	236	23	338
Miata	—	—	1,089
MR2	719	360	171
Mustang	43,095	21,276	10,545
Probe	19,748	10,038	9,151
Pulsar NX	1,648	1,062	235
Reatta	2,033	546	1,757
Regal	15,773	9,100	2,045
RX-7	1,897	706	432
Starion	62	51	—
Storm/Spectrum	8,033	3,171	430
Supra	3,004	1,624	587
Talon	—	—	165
Total Sports Specialty	**229,437**	**121,014**	**77,968**
Total Fleet	**1,904,760**	**1,029,119**	**968,861**

Fleet Managers Extending Lease Periods

A recent survey of 236 fleet managers conducted by *Runzheimer Reports On Fleet Management* found that more than a third had either extended lease periods or were planning to do so in an effort to control fixed costs.

Managers who participated in the survey singled out vehicle depreciation and automobile insurance as the fixed cost factors that impact their operations the most. Nearly half (44 percent) said depreciation has the most impact, while over a third (35 percent) picked insurance costs.

"For any fleet manager, the decision of when to replace vehicles is crucial," says Robert Overend, editor. "Replace too soon, and the cost of new vehicles may be prohibitively high. Wait too long, resale value will fall and repair bills will mount."

The survey also found that nearly half of the polled managers have instituted a preventive maintenance program in the past year in an effort to control fixed costs.

Managers trying to maximize resale value are either adding (37 percent) or eliminating (16 percent) accessories. Some are acquiring smaller vehicles, extending replacement cycles, and eliminating high-priced models.

Here's a breakdown on what steps managers in the survey have taken or are planning to take to control costs:

Fleet Managers' Plans To Control Costs

	Have Taken	Plan to Take
Institute preventive maintenance	46%	26%
Add accessories to increase resale	37%	14%
Switch to smaller vehicles	34%	7%
Extend replacement cycle	33%	26%
Eliminate higher price cars	32%	7%
Reduce fleet size	30%	19%
Switch to smaller engines	29%	4%
Tighten vehicle assignment	27%	29%
Cap executive car costs	23%	7%
Extend lease period	21%	14%
Eliminate certain accessories	16%	11%
Upgrade models to reduce depreciation	14%	8%
Purchase extended warranties	13%	12%
Eliminate executive cars	10%	5%
Obtain used cars	8%	2%

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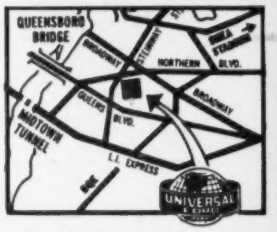

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USED-CAR PRICES

The following are average used-car prices for the period ending July 1, 1990. Prices are based on wholesale activity at major dealers across the country. They are divided into three zones as indicated on the accompanying map. These averages are calculated electronically. They are based on clean cars only. Proper allowance should be made for upgrading sharp cars and proper deduction taken for fair cars. Automatic transmissions have been included in the averages of all models. This information is published in *Automotive Fleet* by special permission of *Automotive Market Report*.

88 BUICK SKYHAWK			
Coupe	5,389	5,440	5,279
Sedan	5,463	5,516	5,357
87 BUICK SKYHAWK			
Cust Coupe	4,365	4,407	4,275
Cust Sedan	4,433	4,473	4,342
88 BUICK SKYLARK			
Cust Sedan	6,452	6,518	6,325
87 BUICK SKYLARK			
Cust Sedan	5,384	5,436	5,275
88 BUICK CENTURY			
Cust Sedan	6,376	6,442	6,251
87 BUICK CENTURY			
Cust Sedan	5,317	5,371	5,209
88 BUICK LESABRE			
Cust Sedan	8,426	8,511	8,259
87 BUICK LESABRE			
Cust Sedan	7,054	7,126	6,914
88 CADILLAC DEVILLE			
Coupe	13,733	13,869	13,456
Sedan	13,893	14,031	13,614
87 CADILLAC DEVILLE			
Coupe	10,977	11,089	10,760
Sedan	11,114	11,226	10,890
88 CADILLAC SEVILLE			
Sedan	14,668	14,816	14,376
87 CADILLAC SEVILLE			
Sedan	12,004	12,125	11,766
88 CHEVY BERETTA			
Coupe	6,255	6,318	6,133
88 CHEVY CORSICA			
Sedan	5,840	5,901	5,728
87 CHEVY BERETTA			
Coupe	4,889	4,939	4,794
87 CHEVY CORSICA			
Sedan	4,494	4,542	4,407
88 CHEVY CAVALIER			
Sedan	5,213	5,267	5,110
87 CHEVY CAVALIER			
Sedan	3,935	3,976	3,858
88 CHEVY CELEBRITY			
Sedan	5,942	6,002	5,823
87 CHEVY CELEBRITY			
Sedan	4,739	4,787	4,646
88 CHEVY CAPRICE			
Sedan	6,739	6,806	6,605
87 CHEVY CAPRICE			
Sedan	5,480	5,532	5,368
88 CHRYSLER NEW YORKER			
Sedan	9,872	9,972	9,676
87 CHRYSLER NEW YORKER			
Sedan	6,905	6,972	6,764
88 CHRYSLER FIFTH AVENUE			
Sedan	9,626	9,722	9,436
87 CHRYSLER FIFTH AVENUE			
Sedan	7,630	7,704	7,476
88 DODGE ARIES AMERICA			
Sedan	4,743	4,788	4,648
87 DODGE ARIES			
Sedan	3,763	3,801	3,688
88 DODGE SHADOW			
Liftbk 5 Dr	5,084	5,135	4,985
87 DODGE SHADOW			
Liftbk 4 Dr	4,135	4,178	4,049
88 DODGE DYNASTY			
Sedan	7,604	7,683	7,452
88 FORD ESCORT			
Htchbk 4 Dr GL	4,284	4,327	4,197
87 FORD ESCORT			
Htchbk 4 Dr GL	3,328	3,361	3,260
88 FORD MUSTANG			
LX-4 Coupe	5,931	5,992	5,812
87 FORD MUSTANG			
LX-4 Coupe	4,811	4,859	4,717
88 FORD TEMPO			
GL Sedan 4 Dr	5,283	5,336	5,176
87 FORD TEMPO			
GL Sedan 4 Dr	4,143	4,187	4,062
88 FORD TAURUS			
GL Sedan 4 Dr	6,793	6,862	6,660
87 FORD TAURUS			
GL Sedan 4 Dr	5,567	5,624	5,456
88 FORD CROWN VICTORIA			
Sedan	9,034	9,123	8,852
87 FORD CROWN VICTORIA			
Sedan	7,459	7,535	7,311
88 THUNDERBIRD			
Coupe	8,126	8,208	7,964
87 THUNDERBIRD			
Coupe	6,655	6,723	6,520
88 LINCOLN			
Town Car Sedan	13,526	13,662	13,255
Mark VII LSC Coupe	14,963	15,112	14,664
Continental Sedan	16,488	16,651	16,158
87 LINCOLN			
Town Car Sedan	11,162	11,272	10,938
Mark VII LSC Coupe	12,629	12,756	12,377
Continental Sedan	12,003	12,125	11,764
88 MAZDA 626			
LX Sedan 4 Dr	7,963	8,042	7,804
88 MERCURY COUGAR			
LS Coupe	8,582	8,668	8,410
87 MERCURY COUGAR			
LS Coupe	7,087	7,157	6,945
88 MERCURY TOPAZ			
GS Sedan 4 Dr	5,368	5,420	5,260
87 MERCURY TOPAZ			
GS Sedan 4 Dr	4,152	4,195	4,071
88 MERCURY SABLE			
GS Sedan	6,890	6,958	6,750
87 MERCURY SABLE			
GS Sedan	5,595	5,654	5,483
88 MERCURY GRAND MARQUIS			
Sedan	9,635	9,730	9,441
87 MERCURY GRAND MARQUIS			
Sedan	8,107	8,186	7,943
88 MITSUBISHI MIRAGE			
Sedan	4,255	4,298	4,170
87 MITSUBISHI MIRAGE			
Sedan	3,043	3,074	2,982
88 NISSAN SENTRA			
Sedan 2 Dr	4,107	4,149	4,025
88 NISSAN STANZA			
E Ntch 4 Dr	6,680	6,746	6,546
88 NISSAN MAXIMA			
SE Sedan	10,563	10,668	10,351
87 NISSAN SENTRA			
Sedan 2 Dr	3,375	3,408	3,307
87 NISSAN STANZA			
E Ntch 4 Dr	5,423	5,476	5,315
87 NISSAN MAXIMA			
SE Sedan	8,206	8,290	8,040
88 OLDS CALAIS			
Sedan	6,381	6,442	6,253
87 OLDS CALAIS			
Sedan	5,391	5,443	5,281
88 OLDS CIERA			
Coupe	6,309	6,372	6,182
Sedan	6,376	6,442	6,251
87 OLDS CIERA			
S Coupe	5,304	5,356	5,195
Sedan	5,364	5,418	5,257
88 OLDS CUTLASS SUPREME			
Coupe	7,487	7,565	7,340
87 OLDS CUTLASS SUPREME			
Coupe	6,240	6,304	6,115
Sedan	6,240	6,304	6,115
88 OLDS 98 REGENCY			
Sedan	9,994	10,091	9,791
87 OLDS 98 REGENCY			
Sedan	8,308	8,391	8,141
88 PLYMOUTH RELIANT			
Sedan	4,767	4,813	4,674
87 PLYMOUTH RELIANT			
Sedan	3,780	3,818	3,709
86 PLYMOUTH SUNDANCE			
Liftbk 4 Dr	5,080	5,131	4,981
87 PLYMOUTH SUNDANCE			
Liftbk 4 Dr	4,116	4,159	4,032
88 PLYMOUTH GRAN FURY			
Salon Sedan	5,107	5,157	5,003
87 PLYMOUTH GRAN FURY			
Salon Sedan	4,090	4,131	4,008
88 PONTIAC SUNBIRD			
SE Coupe	5,371	5,426	5,262
Sedan	5,443	5,494	5,335
87 PONTIAC SUNBIRD			
SE Coupe	4,209	4,252	4,125
Sedan	4,144	4,186	4,063
88 PONTIAC 6000			
Coupe	6,020	6,080	5,901
Sedan	6,087	6,148	5,965
87 PONTIAC 6000			
Coupe	4,843	4,890	4,746
Sedan	4,898	4,949	4,803
88 PONTIAC GRAND AM			
Sedan	6,420	6,483	6,289
87 PONTIAC GRAND AM			
Sedan	5,687	5,743	5,574
88 PONTIAC BONNEVILLE			
Sedan	8,474	8,560	8,306
87 PONTIAC BONNEVILLE			
Sedan	7,056	7,126	6,914
88 PONTIAC GRAND PRIX			
Coupe	7,755	7,834	7,606
87 PONTIAC GRAND PRIX			
Coupe	6,371	6,434	6,242
88 TOYOTA COROLLA			
Sedan 4 Dr Deluxe	6,160	6,222	6,037
88 TOYOTA CAMRY			
Sedan 4 Dr Deluxe	8,029	8,109	7,870
88 TOYOTA CRESSIDA			
Lux Sedan	12,489	12,613	12,240
87 TOYOTA COROLLA			
Sedan 4 Dr Deluxe	4,733	4,781	4,640
87 TOYOTA CAMRY			
Sedan 4 Dr Deluxe	6,793	6,861	6,657
87 TOYOTA CRESSIDA			
Lux Sedan	10,189	10,292	9,985
88 VOLKSWAGEN JETTA			
Sedan 4 Dr	6,553	6,619	6,422
87 VOLKSWAGEN JETTA			
Sedan 4 Dr	5,272	5,325	5,166
88 VOLVO			
240 DL Sedan	11,376	11,487	11,148
87 VOLVO			
240 DL Sedan	9,334	9,429	9,148

PRODUCTS

cludes an 80-page instructor's guide and student handouts. The TSDS training program can be used as a stand–alone safe driving program, or enhance an existing program. *Kolmor Visions, Ltd.*

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GAS PRICES

UNLEADED GAS
Cost Per Gallon

City	Full-Serve	Self-Serve
Little Rock, AR	134.4 ¢	97.4 ¢
Tucson, AZ	135.4	107.6
Santa Barbara, CA	153.9	122.6
Washington, D.C.	147.3	113.9
Savannah, GA	117.6	95.2
Hawaii Island, HI	154.3	137.9
Gary, IN	126.6	109.2
New Orleans, LA	145.4	109.2
Baltimore, MD	141.5	109.5
Lincoln, NE	132.9	116.9
Santa Fe, NM	134.6	112.7
Rochester, NY	118.6	105.6
Tulsa, OK	137.2	99.9
Pittsburgh, PA	128.7	105.0
Tacoma, WA	145.2	113.6

The average U.S. full-serve gasoline price for the month of July was 131.3 cents per gallon.
The average U.S. self-serve gasoline price for the month of July was 109.9 cents per gallon.
Survey conducted during the first five working days of July, 1990.
Supplied by Runzheimer International, Runzheimer Park, Rochester, WI.

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NOTE

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42, 46, 48, 50, 52-54, 61,

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